Forum™ 700

Call Center - Supervisor Application

User Manual (BGC)

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Chapter

1

General Overview

1.1 Supervisor Application Presentation

The Supervisor application allows you to view real-time information on the activity of the Call Center and to simultaneously change parameters, the status and assignment of agents, groups and ACD (Automatic Call Distribution) calls.

You therefore have real-time access to information such as the number and status of the agents connected, the number of calls waiting, of calls deterred or lost, and the status and composition of groups.

1.1.1 Functions

The Supervisor application can be used to perform the following operations:

Observe Call Center activity

The Supervisor application provides a tool which can be used to immediately check the status of your team. In real-time you can:

- Observe the status of agents assigned to telephones: free, on a break, post-processing or busy
- Observe agent activity
- Observe agent activity rate (displayed as percentage)
- Observe the status of groups defined in the Call Center
- Observe group activity: number of calls waiting, received, processed, abandoned, deterred, number of transactions conducted

Manage Call Center activity

You can intervene to:

- Modify agent status: on duty, off duty, clerical work or temporary absence
- Modify group status: open or closed
- Assign agents to groups
- Modify agents belonging to groups

Customize the display of the Supervisor main window

Note:
The supervisor can also act as an agent. However, the Supervisor application cannot under any circumstances replace the Agent application.

1.1.2 Limitations

Following the re-looking of ACD PC based applications from OmniPCX R6.0 up to recent and future implementations, the Supervisor application is no more windows like.

The consequences are:

- The display font size for PC desktop screen must remain the default value (100%) to

guarantee a good display of all ACD application layouts

- A mouse right click on the application icon on windows tasks bar has no effect (no contextual menu is proposed)

In addition, the minimal display resolution of the screen must be: 1024 x 768 pixels

1.2 Accessing Supervisor Application

Procedure:

1. On the desktop, click the **Supervisor** icon.
   The connection properties window appears:

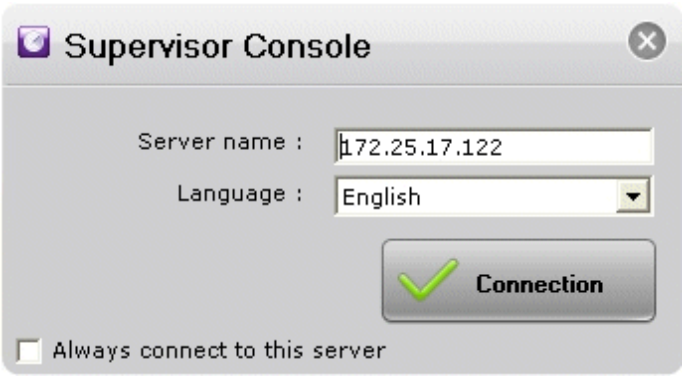

Figure 1.1: Connection Window Example

2. In the **Server name** field, enter the server name or IP address.
3. In the **Language** drop-down list , select the language in which the screens will be displayed.
4. If necessary, validate the checkbox if connection must be always to the same server
5. Click **Connection**.
   The Supervisor application window is displayed and you are now connected.

You can now supervise the activity of the Call Center.

To exit the Supervisor application, click on in the upper right-hand corner of the window to close the application window.

You are now disconnected from the Supervisor application.

1.3 Supervisor Application Interface Overview

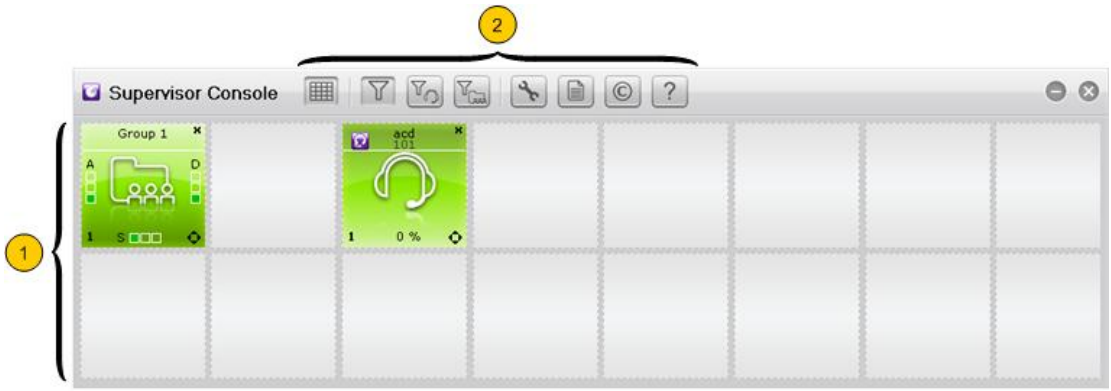

Figure 1.2: Supervisor Application Window

The Supervisor application window consists of:

1. A monitoring area which provides real-time information on groups and agents configured in the Call Center
2. A toolbar for operations on agents and groups displayed in the monitoring area

1.3.1 Monitoring Area Presentation

Figure 1.3: Monitoring Area Example

The monitoring area typically shows groups and agents in a grid:

- Groups are displayed in a row. Up to eight groups can be monitored. Each group is represented by a graphical view providing real time information on group activity (see: Group Status View)
- Agents are displayed in one or more rows. Up to thirty-two agents can be monitored. Each agent is represented by a graphical view providing real time information on agent activity (see: Agent Status View)

The display of groups and agents can be customized:

- Groups and agents can be hidden in the monitoring area.
- The placing of group and agent icons in the monitoring area can be modified.

For more information on the customization of the display, see: Supervisor Application - Display Customization

1.3.1.1 Group Status View

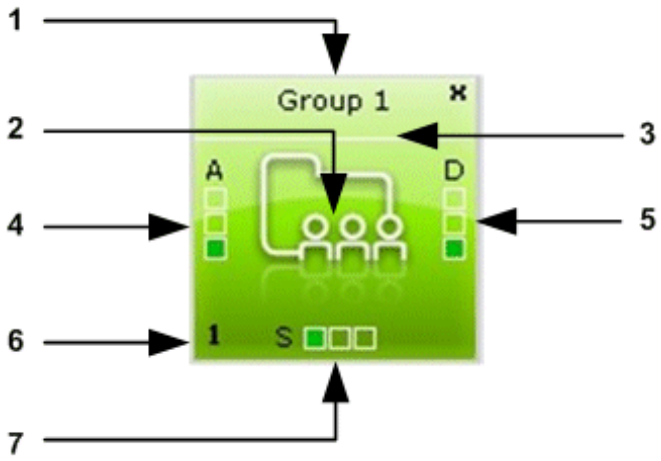

Figure 1.4: Group Status View Example

The group status view consists of:

1. Group name

   In the Supervisor application, the group name takes the form: `Group <number from 1 to 8>`. This group name does not reproduce the group name configured in the ACD general parameters of OMC.

2. The graphical representation of a group (identical for all groups in the monitoring area)
3. Group status indicated by a background color:

Color	Meaning
Green	Group opened
Orange	Group saturated
Red	Group in dissuasion
Gray	Group closed

4. A graphic labelled A (A for Awaiting). It indicates when the group is ready and awaiting calls
5. A graphic labelled S (S for Saturated). It indicates when there are too many calls and the group is overloaded.

   A given group is shown as overloaded as follows:

   - Group x saturated (orange): no agents are free in the group, the next call is placed in the queue.

- Group x dissuasion (red): the time elapsed since the group was saturated is greater than the time defined in the parameter **Time Delay With Flashing of Overload Messages**.

Note:
*The parameter **Time Delay With Flashing of Overload Messages** is configured by the system administrator.*

6. Group identity number
7. A graphic labelled D (D for Dissuasion). It indicates when the group is not ready. Calls are routed to a dissuasion resource

Available operations

From the group status view, you can:

- Display the group activity (see: Supervisor Application - Call and group supervision - Displaying Group Activity)
- Display and modify the list of agents belonging to the group (see: Supervisor Application - Call and group supervision - Displaying and Modifying Agents Belonging to a Group)
- Change the group status (see: Supervisor Application - Call and group supervision - Changing Group Status)

1.3.1.2 Agent Status View

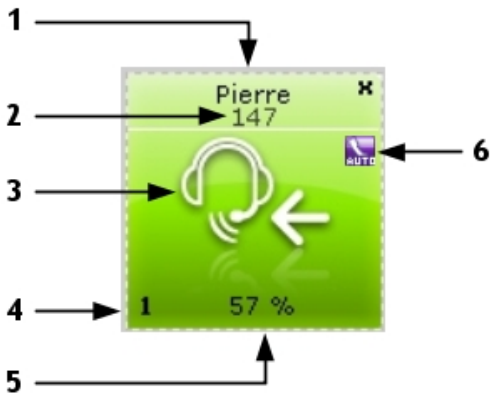

Figure 1.5: Agent Status View Example

The agent status view consists of:

1. Agent name
2. Directory number of the agent set
3. Agent status indicated by an icon and a color. The background color allows to identify agent status quicker in the monitoring area (green: normal, orange: exceptional and red: problematic).

table 1.2: Available Values for Agent Status

Icon	Status	Meaning
	On duty	The agent is logged on and ready to take ACD calls
	Being routed	The agent set is reserved for a call currently being transferred to it (the set is not yet ringing)
	Ringing	The agent's set rings after transfer of the ACD call
	ACD busy	The agent answers an incoming ACD call
	Idle	The agent has just hung up after an ACD call. Agent is then given an idle period before another ACD call is sent
	Click2Call	The agent is in a Click2Call conversation
	Clerical work	The agent withdraws temporarily from the call distribution chain. Following an ACD call, the agent may need to assess the call (for example, fill out a customer information screen)
	Temporary absence	The agent has temporarily gone off duty for a break. Periods of temporary absence are not considered as work time.
	Not available	The agent answers an incoming non-ACD call
	Busy, Outgoing call	The agent does an outgoing non-ACD call
	No answer	The agent does not answer an ACD call. Two scenarios are possible: • If the parameter **Agents That Do Not Answer Are Automatically Removed** has been activated, the agent is taken off duty. • If the parameter **Agents That Do Not Answer Are Automatically Removed** has not been activated, the agent stays off duty for the time period defined in the parameter **Duration of an Agent's Temporary Removal After Failure To Answer** before being switched back to **Awaiting Call** status. *Note:* *The parameters **Agents That Do Not Answer Are Automatically Removed** and **Duration of an Agent's Temporary Removal After Failure To Answer** are configured by the system administrator.*
	Faulty	The agent has not dialed a correct directory number or the agent's set is out of service

Icon	Status	Meaning
	Off duty	The agent has withdrawn from all ACD groups or the agent has no associated set. The agent is no longer available to take ACD calls

4. Agent identity number
5. Agent activity rate (%)
6. The **Force automatic call answer** feature is enabled for this agent

Available operations:

From the agent status view, you can:

- Display agent activity (see: Supervisor Application - Agent Supervision - Displaying Agent Activity)
- Change the agent status (see: Supervisor Application - Agent Supervision - Changing Agent Status)
- Display and modify the list of groups to which the agent can be assigned (see: Supervisor Application - Agent Supervision - Assigning an Agent to a Group)

1.3.2 Toolbar Presentation

Figure 1.6: Supervisor Console Window Example

The toolbar provides the following options:

Button	Click, to:
	Show or hide the dotted lines in the monitoring area. The dotted lines represent grid outlines. This allows you to move groups and agents easily in the monitoring area when the button is activated

Button	Click, to:
	Customize the display of the group and agent in the monitoring area. Groups and agents can be moved manually in the monitoring area *Note:* *This feature is only available when the **Specific** option is validated in the application settings (Supervisor Application - Display Customization - Selecting Agents to be displayed).*
	Modify the agent display in the monitoring area. Agents are automatically placed above groups: - Agents are placed above - Groups are placed below
	Modify the group display in the monitoring area. Groups are automatically placed above agents: - Groups are placed above - Agents are placed below
	Select groups and agents to display in the monitoring area
	Display: - The Click2Call Log to export its information filtered by start and end date in a CSV format file - The SCR traces to export its information in a CSV format file
	Display the supervisor software release
	Display help contents

Chapter

2

Agent Supervision

2.1 Displaying Agent Activity

1. From the monitoring area, double click the agent name of the selected agent status view
   The agent activity window opens:

Figure 2.1: Agent Activity Window Example

The agent activity window provides the following information:

- **Name**: agent name
- **Extension**: extension number of the agent set
- **Status** (and icon on the right side of the window): agent status

  For more information on the available values for agent status, see: Supervisor Application - General Overview - Agent Status View
- **Groups**: groups in which the agent has been assigned
- The percentage indicates agent activity rate, which corresponds to the ratio between the time spent on ACD calls in the selected time slot and the period of time used to calculate activity rates (1 hour or 1/2 hour).

2. Click the close icon on the top part of the window to exit

2.2 Changing Agent Status

You can change the agent status in real-time. For example, if the number of calls is becoming excessive, you can change the status of agents so that they remain on duty and take calls.

1. From the monitoring area, double click in the middle of the selected agent status view
The agent's parameters window opens:

Figure 2.2: Agent's Parameters Window Example

2. In the **Status** field, use the drop-down list to select one of the following values: **On duty**, **Off duty**, **Clerical work** or **Temporary absence**
3. Select the **Force auto answer** check box to enable the **Force automatic call answer** feature
4. Click **OK** to confirm status modification.
   The status of the agent is changed in real-time.
5. Click the close icon on the top part of the window to exit

2.3 Assigning an Agent to a Group

You can change the content of groups by moving an agent from one group to another, depending on the call load in the queue, the duration of calls or the workload observed.

1. From the monitoring area, double click in the middle of the selected agent status view
   The agent's parameters window opens (see: figure: Agent's Parameters Window Example)
   The **Groups** area provides the group list to which the agent can be assigned
2. In the **Groups** area, check the boxes to select the groups in which the agent can be assigned
3. Click the close icon on the top part of the window to exit

Chapter

3

Call and Group Supervision

3.1 Displaying Group Activity

1. From the monitoring area, double click the group name of the selected group status view
The group activity window opens:

Group 1
Group parameters
Status : Open(M)
S A D
Answered calls : 0
Connecting to called party : 0
Agent available : 1
Call parameters
Waiting time < overflow time : 0
In queue > S1 : 0
ACD communication : 0
In queue > S2 : 0
Calls being routed : 0
Deterred calls : 0
Waiting time > overflow time : 0
Calls service closed : 0

Figure 3.1: Group Activity Window Example

The group activity window lists the following parameters:

- Group name and status (see: Group Parameters)
- Call distribution (see: Call Parameters)

2. Click the close icon on the top part of the window to exit

Note:
Parameters are grayed when their counter is set to zero.

3.1.1 Group Parameters

Group parameters include:

- Group name
- Group status:
  - **Open(M)**: group forced open
  - **Closed(M)**: group forced closed
  - **Open**: group opened (depending on time slot or contact)
  - **Closed**: group closed (depending on time slot or contact)

  Note:
  The letter M next to the status indicates when the group status has been manually modified (see: Changing Group Status).
- Graphics labelled **S** for saturated, **A** for awaiting and **D** for dissuasion. For their meaning,

see: Supervisor Application - General Overview - Group Status View

3.1.2 Call Parameters

Call parameters include:

- **Answered Calls**
  The number of ACD calls being started (even if the conversation time is 0 seconds), regardless of the group (called or through overflow).
- **Connecting to called party**
  The number of calls presented (and not yet processed) to ringing agent sets.
- **Agent available**
  The number of agents in the group ready to take calls. This number is decremented each time an agent is in communication
- **Waiting Time < Overflow Time**
  The number of calls which have been waiting less time than the overflow time delay (search for agent only in the group requested). Overflow time represents the overflow time delay defined for each ACD group by the system administrator.
- **ACD Communications**
  The number of simultaneous calls handled by agents of the group
- **Calls Being Routed**
  The number of calls in the process of being connected to an agent, but not yet put through.
- **Waiting Time > Overflow Time**
  The number of calls which have been waiting longer than the overflow time delay (search for agent only in the group requested and possibly in the overflow group if the latter is entered).
- **In Queue > S1**
  The value depends on the parameter **Waiting Begins Before Overflow Time Delay**:
  - Parameter validated: Number of calls whose waiting time in queue is greater than **S1**. **S1** is a threshold defined by the system administrator, allowing the determination of service quality criteria. In this case, counting of the queue time for the statistics starts as soon as the call enters the queue.
  - Parameter disabled: Number of calls whose waiting time in queue is greater than **S1 + Overflow Time**. In this case, counting of the queue time for the statistics starts on termination of the overflow time delay, and the wait before this threshold is ignored.
- **In Queue > S2**
  The value depends on the parameter **Waiting Begins Before Overflow Time Delay**:
  - Parameter validated: Number of calls whose waiting time in queue is greater than **S2**. **S2** is a threshold defined by the system administrator, allowing the determination of service quality criteria.
  - Parameter disabled: Number of calls whose waiting time in queue is greater than **S2 + Overflow Time**.
- **Deterred Calls**
  Number of calls routed to the dissuasion announcement following saturation of the queue, or if no agent is defined in a given group.
- **Calls Service Closed**
  Number of calls taking place while the group is closed.

- **Other Calls**

  Number of calls: All outgoing calls (including Click2Call feature) are seen as "Other Call". A supplementary field containing the dialed number is created in Agent Assistant's call log.

  Reminder:
  ACD agents' log are stored locally on the Agent's PC file system

  Click2Call log are stored on the Call Server file system running with SD-CARD or Hard-disk.

3.2 Displaying and Modifying Agents Belonging to a Group

1. From the monitoring area, right click in the middle of the corresponding group status view
   The group agent window opens:

Figure 3.2: Group Agent Window Example

The window displays the list of agents belonging to the group with their status view. If necessary, you can remove one or several agents from the group.

2. To remove an agent from the group, deselect the option checkbox of the corresponding agent status view
3. Click another part of the monitoring area to exit this window

3.3 Changing Group Status

1. From the monitoring area, double click in the middle of the selected group status view
   The group status window opens:

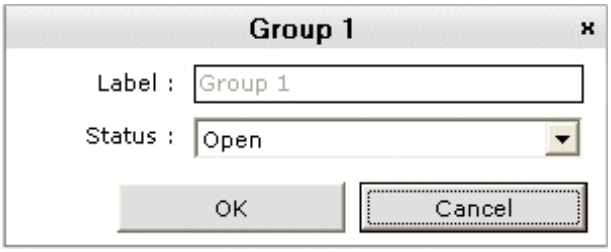

Figure 3.3: Group Status Window Example

2. In the **Status** field, use the drop-down list to select one of the following values:
   - **Open** (Manual): to force the group opening
   - **Closed** (Manual): to force the group closing
   - **Automatic**: to open the group in accordance with time slots
3. Click **OK** to confirm status modification or click **Cancel** to close the group status window without saving your modifications

   The status of the group is modified in real-time.
4. Click the close icon on the top part of the window to exit

Chapter

4

Display Customization

4.1 Selecting Agents to be displayed

1. Click the button in the toolbar of the Supervisor application

   The selection window opens:

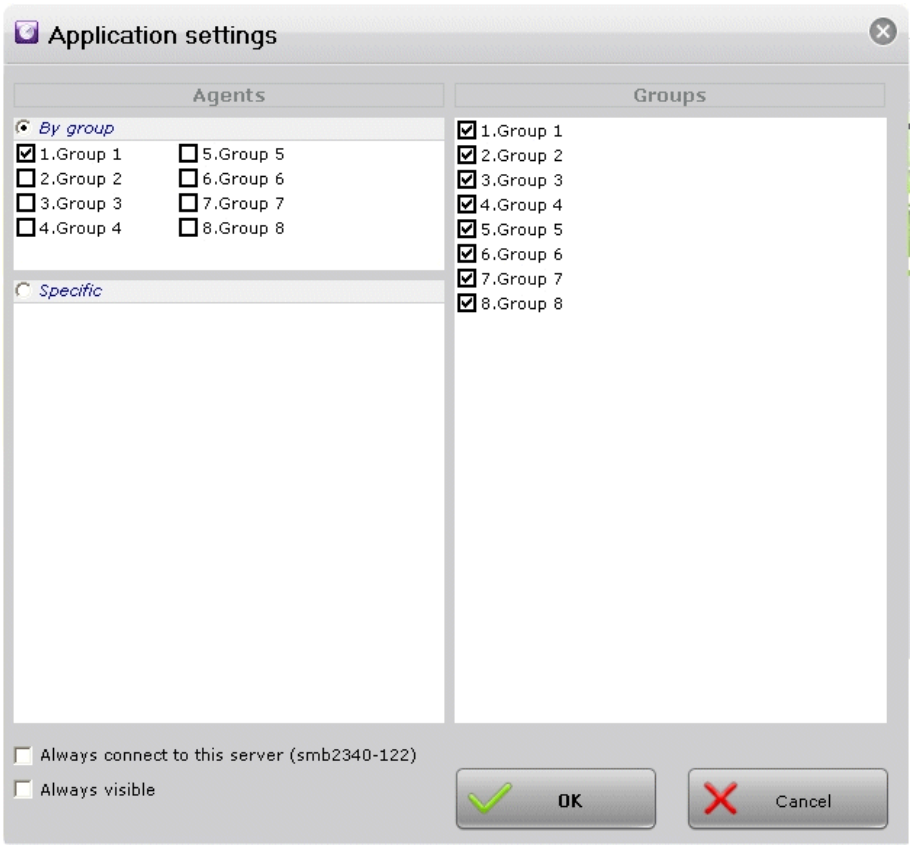

Figure 4.1: Group and Agent Selection Window Example

2. In the **Agents** area, agents can be selected:
   - By group. All agents of the group are selected at the same time.
     1. Validate the **By group** checkbox
     2. Validate the checkboxes of groups whose agents must be displayed in the monitoring area
   - Agent by agent. Each agent is selected individually, regardless of the group they belong to.
     1. Validate the **Specific** checkbox
     2. Validate the checkboxes of the agents to display in the monitoring area
3. Click the close icon on the top part of the window to validate selection and exit
   The monitoring area is displayed with the agents selected previously

4.2 Selecting Groups to be Displayed

1. Click the button in the toolbar of the Supervisor application

   The selection window opens (see: figure: Group and Agent Selection Window Example)
2. In the **Groups** area, validate the checkboxes of the groups to display in the monitoring area
3. Click the **OK** button to validate selection and exit the window
   The monitoring area is displayed with the groups selected

4.3 Organizing Groups and Agents Layout

Groups and agents can be moved manually in the monitoring area, such as:

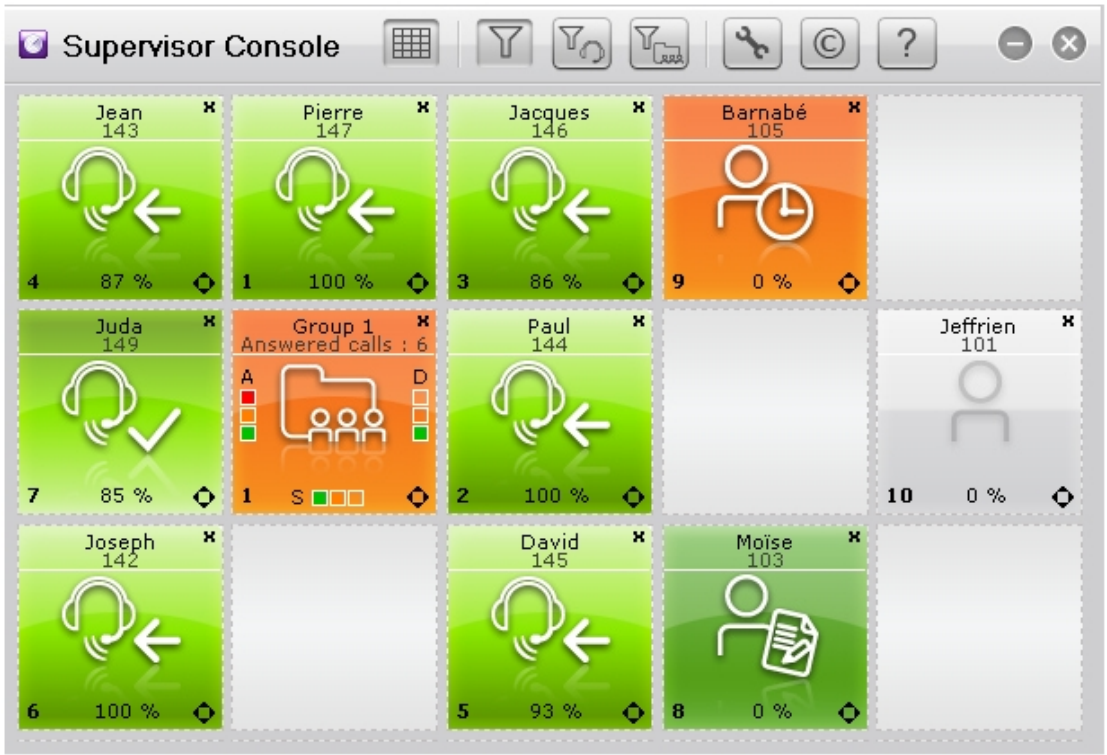

Figure 4.2: Groups and Agents Organization Example

To modify groups and agents organization, perform the following:

1. Click the button in the toolbar of the Supervisor application

   In the monitoring area, the symbol appears at the bottom right of group and agent status views
2. Point the mouse cursor on the group or agent to move

3. Click (left mouse button) and drag the selected group or agent to its final position

Note:
This feature is only available when the ***Specific*** *option is validated in the application settings (see: figure: Group and Agent Selection Window Example). The* *symbol appears when the feature is available.*

Chapter 4 *Display Customization*